



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

**Date:** 9/28/2007

**GAIN Report Number:** NZ7028

## New Zealand

### Exporter Guide

### Annual

### 2007

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**Report Highlights:** U.S. consumer-oriented product exports to New Zealand reached a record \$113 million in CY 2006 accounting for over 60% of total exports. Record setting items include fresh fruits, processed fruits and vegetables, chilled and frozen red meats, snack foods, fruit and vegetable juices, and tree nuts. Total U.S. agricultural, fish and forestry exports to New Zealand were \$174 million in CY 2006.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Annual Report  
Wellington [NZ1]  
[NZ]

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## Section I: Market Overview

Comparable in size to Colorado, New Zealand is an island country with a diverse multicultural population of 4.23 million people. It is a largely urbanized society with over half of the population residing in the four largest cities: Auckland, Wellington, Christchurch and Hamilton. With a population of 1.3 million, approximately one-third of New Zealanders live in Auckland.

According to the 2006 census results, New Zealand's ethnic makeup continues to change. While 67.6% of the population is of European descent, the Māori ethnic group is the second largest ethnic group, with 565,329 people, accounting for just under 15% of the total population. Of the major ethnic groups, the Asian ethnic group is growing at the fastest rate reaching 354,552 people in 2006, a 50% increase from 2001. Those identifying with the Pacific Island ethnic group are growing the second fastest reaching 265,974 people in CY 2006, a 14.6% increase from 2001.

In CY 2006, approximately 21% of the population was under the age of 15 and 12.4% was over the age of 65. The median age was 35.8, however, the Māori population is much younger than the total population. The median age of the Māori ethnic group was 22.8 years, 13 years younger than that of the total population. In CY 2006, annual population growth was approximately 1.0%. Net migration was 10,688 individuals with 70,546 departures and 79,139 arrivals.

### Quick Facts (2007/June Year)

- Population: 4.23 million
- Real GDP Growth: 1.7%
- Unemployment Rate: 3.6%
- Consumer Price Inflation: 2.0%

### Income Facts (2006/March Year)

- Median Income: NZ \$24,400/US \$ 17,080 (up 32% from 2001)
- Median Income for Men: NZ \$31,500/US \$22,050
- Median Income for Women: NZ \$19,100/US\$13,370
- Median Family Income: NZ \$59,000/US \$41,300

The retail grocery market in New Zealand is well developed with supermarkets, small-scale grocery stores, fresh food specialty stores and convenience stores in all the major population centers. New Zealand's retail grocery sales are valued at over NZ \$13 billion (US \$10 billion) for the June 2006/2007 year. The majority of retail grocery sales, nearly NZ \$11.2 (US \$8.2 billion), are made through supermarkets.

On a value basis, Australia is New Zealand's largest agricultural supplier with a 47% market share in CY 2006. The United States is the second largest supplier with a 9.3% market share and Malaysia comes in third with a 2.8% market share. U.S. agricultural, fish and forestry exports to New Zealand were \$174 million in CY 2006, while U.S. imports from New Zealand during the same period were \$2.1 billion.

In CY 2006, consumer-oriented products accounted for over 60 percent of total U.S. agricultural exports to New Zealand. The leading U.S. consumer-oriented exports to New

Zealand are fresh fruit, processed fruits and vegetables, fruit and vegetable juices, snack foods, nuts, frozen red meat and pet foods. Australia is New Zealand's largest supplier of consumer-oriented products with a 50% share, followed by the United States with 9.5% and China with 3.7%. New Zealand consumer-oriented imports from China are expanding rapidly, up from US \$30.9 million in 2004 to \$48.4 million in 2006. Leading New Zealand imports from China include sugar confectionery products, peanuts, pasta, frozen vegetables, apple juice, prepared peaches, various food preparations and garlic.

### Advantages/Challenges for U.S. Consumer Food Exports to New Zealand

Advantages	Challenges
Familiar business and cultural environment; no language barriers to overcome	New Zealand labeling laws are different from those in the U.S.
U.S. products enjoy a quality reputation along with their novelty status although competition is tough.	Growing competition from China in the consumer-oriented food category.
Minimum barriers to trade including relatively low tariffs	Strict phytosanitary/sanitary regulations with regard to fresh produce and meats.
U.S. fresh products are marketed during New Zealand's off-season.	Consumer foods imported from Australia and Canada enter duty-free, while U.S. exports are assessed tariffs between 0 and 7%.
New Zealand is an increasingly multicultural society, which creates opportunities for ethnic foods including Asian, Mexican, Turkish and Indian.	

## Section II: Exporter Business Tips

- Business practices and customs in New Zealand are similar to those in the United States.
- Local agents/distributors can be useful in facilitating and promoting exports of some U.S. consumer-ready foods to New Zealand.
- U.S. exporters are advised to consider in-store promotions for their food products to boost sales in New Zealand.
- Fresh U.S. produce is an especially welcome addition to New Zealand retail shelves during winter in the Southern Hemisphere.
- U.S. exporters are encouraged to review the Food Standards Code, which was developed by Food Standards Australia New Zealand Food (FSANZ) and implemented in 2002. The Food Standards Code applies to both New Zealand and Australia. For an overview of labeling requirements, please see [User Guide](http://www.foodstandards.govt.nz) on the FSANZ web site: <http://www.foodstandards.govt.nz>.
- In December 2001, mandatory-labeling requirements for genetically modified foods (foods produced using gene technology) came into effect in New Zealand. The requirements are covered in [Genetically Modified Foods](#) of the joint New Zealand Australia Food Standards Code.

## SECTION III: MARKET SECTOR STRUCTURE AND TRENDS

### Market Structure

Two supermarket chains, Foodstuffs (NZ) Limited and Progressive Enterprises Limited, dominate the New Zealand retail sector which is valued at NZ \$13 billion (US \$10 billion).

Foodstuffs has a 56% share of the New Zealand grocery market and Progressive Enterprises has a 43% share. A new entrant, Warehouse Extra, holds a 1% share of supermarket sales.

### New Zealand Retail Market Distribution

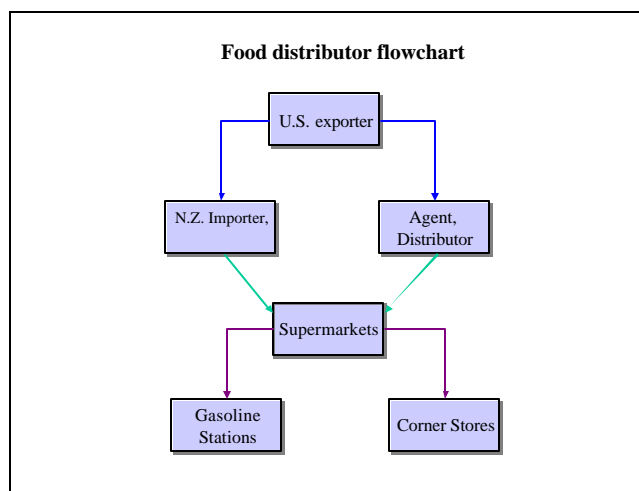
Supermarket Group	Ownership	Market Share	Store Names
Foodstuffs (NZ) Ltd	New Zealand owned; made up of three independently owned co-operatives	56%	<ul style="list-style-type: none"> <li>▪ New World</li> <li>▪ Pak N Save</li> <li>▪ Write Price</li> <li>▪ Four Square</li> </ul>
Progressive Enterprises	Owned by Woolworths Limited (Australia)	43%	<ul style="list-style-type: none"> <li>▪ Woolworth</li> <li>▪ Foodtown,</li> <li>▪ Countdown</li> <li>▪ Supervalu</li> <li>▪ Fresh Choices</li> </ul>
The Warehouse Group	New Zealand Owned	1%	<ul style="list-style-type: none"> <li>▪ Warehouse Extra</li> </ul>

Foodstuffs (NZ) Limited is one of the largest grocery distributors representing 641 stores in New Zealand (including 43 Pak N Save; 130 New World; 279 Four Square; 3 Write Price stores; 3 Shoprite; 2 Duffy & Finns; and 10 Henry's Beer Wine and Spirit nationwide). The marketing organization of Foodstuffs Limited consists of three regionally based, retailer-owned cooperative companies, along with their parent company Foodstuffs (NZ) Ltd. The three cooperatives are: Foodstuffs (Auckland) Co-operative Society Limited, which covers the middle to upper North Island; Foodstuffs (Wellington) Co-operative Society Ltd, which covers the southern half of the North Island; and Foodstuffs (South Island) Co-operative Society Limited, which covers the entire South Island. U.S. exporters should contact each of the regional Foodstuffs offices since they make buying decisions independently of each other. (Please see Section V for contact information.)

Woolworth Limited (Australia) includes 63 Woolworths stores, 30 Foodtown, 55 Countdown, 31 Supervalu, 12 FreshChoice and 22 Woolworths Micro and Quickstop Convenience stores. The Australian parent recently announced plans to streamline Progressive's systems and apply its supply chain and inventory management system, which will likely drive down costs and prices. All import-purchasing decisions are made at its headquarters in Auckland.

A new entrant in the New Zealand supermarket industry is the Warehouse Group. The Warehouse has large merchandise stores located nationwide. In 2007, the Warehouse announced its expansion into the grocery sector under a banner, Warehouse Extra. These stores will offer general merchandise and grocery products, including fresh produce. Currently, Warehouse Extra is present in Auckland, however, the company plans to expand to other cities by June 2008.

U.S. exporters can work with agents, distributors or import brokers who can target food category/merchandise managers at major wholesalers and supermarkets chains. Approximately 90% of all imported food products are purchased by and distributed within New Zealand by importers/agents/distributors.



### Market Trends

- As in other countries, lifestyle changes are driving a trend toward convenience foods and carry-out meals. At the same time, consumers are increasingly more health conscious, preferring fresh and natural foods. This trend is reflected in increasing consumption of vegetables, fresh fruit and fish and declining consumption of red meat and dairy products.
- In addition to convenience and health, value-for-money is an important factor driving sales.
- In the quest for convenience, consumers are opting for more frozen foods, with ethnic foods being popular. Supermarkets are responding by devoting increased shelf space and expanding the range of ethnic products with fresh, frozen and ready-to-eat meals.
- According to the AC Nielsen Grocery report, supermarket categories which showed more than 10% growth in 2006 are:
  - Convenience: Canned meat and fish; cakes and cookie mixes, tinned tomatoes, Mexican meal kits.
  - Flavor: Oils and fats, cooking sauces, herbs and spices.
  - Healthier snack alternatives: dry nuts, dried fruit and rice crackers.
- The trend towards meat-free meals is growing, with one in two New Zealand consumers eating at least one meat-free meal per week.
- Organic, wholegrain and whole meal products continued to grow in 2007.
- Retail sales of meal replacement products grew 7% in 2007 to NZ \$26 million. Meal replacement slimming products were the fastest growing sub sector at 10%. Reasons for this include convenient packaging and heavy advertising. Heinz Wattle's Ltd. leads in meal replacement products with a value share of 34% in 2006.
- Private label products continue to grow in the New Zealand supermarket industry. In June 2006, private label accounted for 11.4% of packaged products and growing at the rate of 5% per year. Private label has over a 20% share in the chilled food category.
- New Zealand is an increasingly multicultural society, which creates opportunities for ethnic foods including Asian, Mexican, Turkish and Indian.

## Section IV: Best Value Product Prospects

Product Category	Total Imports 2006 (US\$ millions)	5 Year Average Annual Import Growth	Import Tariff Rate	Key Constraints over Market Development	Market Attractiveness for U.S.
<b>Fresh Grapes</b>	\$16,321	23%	Free	NZ is a small market; competition from Chilean and Australian grapes.	High growth potential. Consumers want fruits to be available year round.
<b>Fresh Fruits (apricots, cherries, peaches, plums)</b>	\$4,476	29%	Free	Some consumers have a slightly negative quality perception of imported fresh fruits.	U.S. can supply counter-seasonal fruit. Consumers want fruits to be available year round.
<b>Pears</b>	\$3,869	35%	Free	Consumer resistance to unfamiliar varieties such as red Anjou pear.	NZ is one of the first markets to get the fresh pear crop.
<b>Citrus Fruit</b>	\$19,202	15%	Free	Small market	New Zealand consumers appreciate quality of U.S. citrus.
<b>Fruit Juice</b>	\$31,031	14%	5-7%	U.S. products are expensive compared to product from some competitor countries.	Value-added juices/ concentrates with health and nutritional benefits have potential to grow.
<b>Processed Fruits &amp; Vegetables</b>	\$152,390	14%	0-7%	U.S. products are expensive compared to other countries such as China.	U.S. has a reputation of supplying good quality product. To be successful, product must be price competitive.
<b>Dry Fruit (dates, figs, raisins)</b>	\$2,511	14%	Free	U.S. is price competitive in raisins; faces tough competition in dates/figs category.	Expanding demand for good quality and healthy foods.
<b>Dry Nuts (almonds/ walnuts/ pistachios)</b>	\$27,417	24%	Free	Competition from Australia and other countries; need to be price competitive to maintain market share.	U.S. dry nuts are considered high quality. Market share can be expanded if price competitive and promoted as healthy and nutritional snack food.
<b>Snack food (unpopped microwaveable popcorn, potato/corn chips, confectionery)</b>	\$155,945	16%	6.5-7%	Australia and New Zealand enjoy similar tastes/flavors in snack items.	Market growth is high in microwavable popcorn category due to increasing demand for convenience and snack food.
<b>Breakfast Cereal</b>	\$32,630	21%	Free	Multinational companies in Australia enjoy economies of scale, making their products price competitive vis a vis U.S. products.	Media is promoting breakfast as an important meal of the day which might help growth potential.
<b>Pet Food</b>	\$65,869	13%	0-7%	Price competitive products from Australia.	Strong demand for premium products.

**Section V: Key Contacts*****Foodstuffs (Wellington) Co-operative Society Limited***

PO Box 38-896  
Kiln Street,  
Silverstream  
Wellington, New Zealand  
Attn: Eve Kelly, Purchase Manager; Andrew Loveridge  
Tel: +64-4-527-2510; 04-527-2655  
Email: [eve.kelly@foodstuffs-wgtn.co.nz](mailto:eve.kelly@foodstuffs-wgtn.co.nz)

***Foodstuffs (South Island) Co-operative Society Limited***

167, Main North Road,  
Papanui  
Christchurch, New Zealand  
Attn: Graham May, Purchase Manager  
Tel: +64-3-353-8648  
Email: [gmay@foodstuffs-si.co.nz](mailto:gmay@foodstuffs-si.co.nz)

***Foodstuffs (Auckland) Co-operative Society Limited***

PO Box CX12021  
Auckland,  
New Zealand  
Attn: Mr. Tony Olson, Purchase Manager  
Tel: +64-4-621-0641  
Email: [tolson@foodstuffs.co.nz](mailto:tolson@foodstuffs.co.nz)

***Progressive Enterprises***

Private Bag 93306  
Otahuhu  
Auckland, New Zealand  
Attn: Graham Walker, Business Manager  
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***Food Standards Australia New Zealand (FSANZ)***

108 The Terrace  
Wellington 6036  
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Tel: 64-4-978-5631  
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Internet Homepage: <http://www.foodstandards.govt.nz>

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Email: [Rebecca.mcgill@nzfsa.govt.nz](mailto:Rebecca.mcgill@nzfsa.govt.nz)Internet Homepage: <http://www.nzfsa.govt.nz>**Ministry of Agriculture and Fisheries (MAF)**

PO Box 2526

Wellington

New Zealand

Tel: 64-4-474-4100

Fax: 64-4-474-4111

Internet Homepage: <http://www.maf.govt.nz>**Restaurant Association of New Zealand**

P.O. Box 47 244

Ponsonby

Auckland, New Zealand

Phone: 64-9- 378-8403

Fax: 64-9- 378-8585

Internet Homepage: <http://www.restaurantnz.co.nz>

## APPENDIX 1. STATISTICS

Table A. Key Trade and Demographic Information

Key Trade & Demographic Information			
Agricultural Imports from All Countries (US\$ millions/U.S. Market Share (%))	(2006)	\$1,867	9%
Consumer Food Imports from All Countries (US\$ Millions)/U.S. Market Share (%)	(2006)	\$1,301	10%
Edible Fishery Imports from All Countries (US\$ millions)/U.S Market Share (%)	(2006)	\$80	2%
Total Population (Millions)/Annual Growth Rate	(2007)	4.23 million	1.0%
Urban Population (Millions)	(2007)	2.23 m	52%
Number of Major Metropolitan Areas <sup>1</sup>		1	30%
Size of the Middle Class (Thousands) <sup>2</sup> / Growth Rate		NA	NA
Per Capita Gross Domestic Product (US\$)	(2007 )	\$28,642	-
Unemployment Rate (%)	(2007)	-	3.6%
Per Capita Food Expenditure (US\$)	(2006)	\$2,923	-
Percent of Female Population Employed	(2007)		46%
Exchange Rate	(Oct 2007)		US\$1 = NZ\$1.36

Source: U.N. Database; Statistics New Zealand; Coriolis Research

1/ Under the definition 'in excess of 1 million' there is only one city - Auckland with a population of 1,321,074. New Zealand has 4 major metropolitan areas: Wellington with a population of (456,654), Christchurch (348,435), Hamilton (129,249) and Auckland (1.3 m).

2/ New Zealand middle class: annual income ranging from NZ\$15,000 to NZ\$50,000

**Table B. New Zealand Consumer-Oriented Food Product Imports**

New Zealand Top 15 Ranking	Imports (US\$)		
	2004	2005	2006
	1000\$	1000\$	1000\$
Australia	578,542	635,132	649,476
United States	99,858	120,305	124,481
China	30,912	39,408	48,390
Swaziland	41,571	46,966	33,667
Philippines	20,571	25,690	29,286
Italy	22,509	25,350	28,342
Canada	19,491	24,928	28,008
France	19,934	26,433	27,099
Netherlands	19,011	21,733	26,026
Ireland	6,713	18,377	24,016
Thailand	19,717	23,225	22,566
United Kingdom	13,641	17,845	20,027
Fiji	14,676	16,277	17,592
Germany	10,718	16,341	15,40
Ecuador	15,163	15,952	14,253
<b>World</b>	<b>1,085,485</b>	<b>1,252,094</b>	<b>1,078,176</b>

Source: Global Trade Atlas

**Table C. New Zealand Fish & Seafood Product Imports**

New Zealand Top 15 Ranking	Import (US\$)		
	2004	2005	2006
	\$1000	\$1000	\$1000
Thailand	26,508	29,340	29,526
China	5,287	12,044	14,125
Canada	5,781	6,703	6,616
Australia	5,114	5,844	5,692
Vietnam	968	2,521	3,334
New Zealand	600	1,248	3,048
Chile	1,455	2,200	2,825
India	981	1,208	2,220
Korea South	1,307	1,727	1,942
United States	1,699	1,770	1,913
Argentina	759	1,042	1,777
Japan	1,848	1,240	1,219
Fiji	901	1,040	1,182
Malaysia	1,492	1,542	1,067
<b>World</b>	<b>58,266</b>	<b>74,046</b>	<b>80,197</b>

Source: Global Trade Atlas

**Table D. New Zealand Imports of Agriculture, Fish & Forestry Products**

New Zealand Import (In Millions of dollars)	Imports from the world			Imports from the U.S.			U.S. Market Share		
	2004	2005	2006	2004	2005	2006	2004	2005	2006
<b>CONSUMER ORIENTED FOODS</b>	1,085	1,252	1,301	99	120	124	9%	10%	10%
Snack Foods (Excl Nuts)	130	150	155	03	03	03	02%	02%	2%
Breakfast Cereals & Pancake Mix	26	32	32	123	240	367	0%	0%	1%
Red Meats, Fresh/Chilled/Frozen	64	82	80	07	11	10	12%	13%	12%
Red Meats, Prepared/preserved	21	23	25	02	03	02	13%	15%	7%
Dairy Products (Excl. Cheese)	27	36	39	01	02	04	0.	0%	1%
Cheese	11	18	16	05	01	03	04%	0%	0.2%
Eggs & Products	02	01	02	01	02	01	02%	11%	3%
Fresh Fruit	74	88	91	19	23	24	26%	26%	26%
Fresh Vegetables	15	16	19	05	09	09	3%	5%	5%
Processed Fruits and Vegetables	130	144	152	13	15	14	10%	10%	9%
Fruit & Vegetable Juices	29	31	31	01	02	03	5%	8%	9%
Tree Nuts	17	27	17	04	07	07	27%	28%	28%
Wine & Beer	117	125	126	08	05	03	0.6%	0.4%	0.2%
Nursery Products & Cut Flowers	05	06	06	04	03	04	7%	6%	6%
Pet Foods (Dog & Cat Food)	42	48	51	15	18	21	56%	50%	47%
Other Consumer-oriented products	369	417	442	28	32	36	7%	7%	8%
<b>Fish &amp; Seafood Products</b>	58	74	80	01	01	2	2%	2%	2%
Salmon	06	06	06	01	01	1	20%	21%	24%
Surimi	03	07	06	0	01	0	1%	1%	0%
Crustaceans	17	22	22	01	0	0	0%	0%	0%
Ground & Flatfish	01	04	06	0	01	01	0%	0%	0%
Molluscs	06	09	10	02	01	01	3%	1%	1%
Other Fishery Products	22	24	27	0	0	0	0%	0%	0%
<b>AGRICULTURAL PRODUCTS TOTAL</b>	<b>1,599</b>	<b>1,777</b>	<b>1,867</b>	<b>144</b>	<b>164</b>	<b>160</b>	<b>9%</b>	<b>9%</b>	<b>9%</b>
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	<b>1,758</b>	<b>1,966</b>	<b>2,058</b>	<b>151</b>	<b>171</b>	<b>168</b>	<b>8%</b>	<b>9%</b>	<b>8%</b>

Source: Global Trade Atlas

## APPENDIX 2 - Domestic Trade Shows

There are three major domestic Food Trade Shows in New Zealand:

1. *Foodstuffs Food Show, Palmerston North (August 2008)*

This is a trade-only show that exclusively targets Foodstuffs Limited supermarket store owners/buyers and distributors from the Upper North Island and from the South Island. Foodstuffs Limited operates more than 150 supermarkets throughout New Zealand and controls about 55 percent of New Zealand's retail/supermarket food trade. Foodstuffs Food Show 2007 will focus on fresh-produce (including seafood, deli, butchery, fresh produce and bakery). Contact details are:

Foodstuff Food Show  
Silverstream  
Wellington  
Atn: Joanna Fefita  
Tel: 64-4-527-2607

2. *HospitalityNZ, Auckland (September, 2008)*

This show attracts hospitality industry contacts and some local food importers/buyers. Around 8,000 visitors attend this show. It takes place every September in Auckland. Contact details are:

The XPO Group Ltd  
PO Box 9682 New Market  
Auckland, New Zealand  
Tel: 64-9-300-3950  
Fax: 64-9-379-3358  
Internet Homepage: <http://www.hospitalitynz.co.nz>

3. *Katrina Gordon Show (major metropolitan centers)*

This local food show takes place in 16 major cities of New Zealand, including Auckland, Wellington, Christchurch and Queenstown in different months throughout the year. For more information, contact:

Katrina Gordon Trade Shows  
PO Box 8647  
Christchurch, New Zealand  
Tel: 64-3-348-2042  
Fax: 64-3-348-0950  
Internet Homepage: <http://www.kgts.co.nz>

## APPENDIX 3 – Other Useful Reports

The Food and Agriculture Import Regulations and Standards (FAIRS) report for New Zealand contains detailed information on New Zealand's food standards, labeling requirements, import regulations, etc. This report can be found at the following website:  
<http://www.fas.usda.gov/scripts/attacherep/default.htm>